	<b>Request for Quotation</b>		<b>Arizona State Retirement System</b> 13 <sup>th</sup> Floor 3300 N. Central Phoenix, AZ 85012	
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	DUE DATE: November 30, 2007	AT 3:00 P.M. MST		OF 16

### PRICE SHEET

THE TERMS AND CONDITIONS INCLUDED WITH THIS FORM SHOULD BE REVIEWED AND UNDERSTOOD BEFORE PREPARING A QUOTATION. RETURN THE QUOTATION BY THE ABOVE TIME AND DATE TO THE ADDRESS BELOW.

**DELIVERY LOCATION:**

**Arizona State Retirement System**

**3300 N. Central Ave., 13<sup>th</sup> Floor**

**Phoenix, AZ 85012**

**AGENCY CONTACT: Shireen Boone**

**Email Address: ShireenB@azasrs.gov**

**VENDOR:**

**Email Address:**

**VENDOR CONTACT:**

**TELEPHONE:                      and FAX NO.:**

### VENDOR QUOTATION

LINE NO.	PRODUCT & SERVICE DESCRIPTION	QUANTITY	U/M	UNIT PRICE	EXTENDED PRICE
1	<b>Survey Tracking System - Hardware and Software</b> as stated in the Special Terms and Conditions, and the Scope of Work. Pricing includes shipping, and excludes tax. Warranty period for parts and service is  for a period of _____	1	Each		
2	<b>Survey Tracking System</b> – Professional Services includes training (onsite <input type="checkbox"/> , &/or online <input type="checkbox"/> ) and support (onsite <input type="checkbox"/> , online <input type="checkbox"/> , phone <input type="checkbox"/> , &/or email <input type="checkbox"/> )				
3	<b>Survey Tracking System</b> – Annual Software Maintenance including upgrades				
4	<b>Survey Tracking System</b> – Hardware Maintenance. Maximum onsite response time is _____ hours or _____ days for locations within a radius of _____ miles.				
5	<b>Forms to print custom made answer sheets</b> – if applicable, indicate pricing for forms. _____ forms are included per package				
6	<b>Other</b> – a product or service enhancement in addition to the stated scope of work.				



# Request for Quotation

## Arizona State Retirement System

13<sup>th</sup> Floor

3300 N. Central

Phoenix, AZ 85012

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DUE DATE: November 30, 2007

AT 3:00 P.M.  
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**PLEASE NOTE** - If this document is downloaded from the State Procurement Office (SPO) website <http://www.azspo.az.gov> or from <http://www.azasrs.gov/web/index.do> the ASRS website, it is the responsibility of all interested in responding to this solicitation, to verify the issuance of an amendment prior to the RFQ closing date. Amendments may be posted at either of the websites listed above, however it is recommended that all interested in responding to this solicitation should email Shireen Boone at [ShireenB@azasrs.gov](mailto:ShireenB@azasrs.gov) requesting to be added to the respondents list for this solicitation. In the event an amendment is issued, it will be emailed to each respondent on that list.

### THIS SECTION MUST BE COMPLETED BY OFFEROR

If payment is made within \_\_\_\_\_ calendar days after acceptance of goods and/or services, the above quoted price, excluding sales tax, shall be discounted by \_\_\_\_\_%.

If payment is made by the Arizona State American Express Purchasing Card program, after acceptance of goods and/or services and an accepted invoice has been provided, the above prices excluding sales tax, shall be discounted by \_\_\_\_\_ %.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name and Title

The bidder certifies that the above referenced organization is \_\_\_\_\_ / is not \_\_\_\_\_ a small business with less than 100 employees or has gross revenues of \$4 million or less.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date


The bidder certifies that the above referenced organization is a ☐ Minority and/or ☐ Women based business as in accordance with Executive Order 2007-21 issued by Governor Napolitano. Check the following boxes that apply: ☐ African American, ☐ Asian, ☐ Hispanic, ☐ Native American, ☐ Other.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Original signed offers must be in the actual possession of the Arizona State Retirement System, Procurement Division, 3300 N. Central Ave., Suite 1300, Phoenix, AZ 85012 on or prior to the time and date and at the location indicated above. **Late offers will not be considered except as provided by the Arizona Procurement Code.**

**Offers must be submitted in a sealed envelope or package with the Solicitation number and the offeror's name and address clearly indicated on the envelope or package. All offers must be completed in ink or typewritten.**

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## 1. PREPARATION OF QUOTATION:


- a. Erasures, interlineations or other modifications in the quotation shall be initialed in original ink by the authorized person signing the Vendor Offer.
- b. In case of error in the extension of prices in the quotation, unit price shall govern. No quotation shall be altered, amended or withdrawn after the specified quotation due time and date.
- c. Periods of time, stated as a number of days, shall be calendar days.
- d. It is the responsibility of all Offerors to examine the entire Request For Quotation package and seek clarification of any requirement that may not be clear and to check all responses for accuracy before submitting a quotation.

## 2. QUOTATION SUBMITTAL REQUIREMENTS:

The offeror should submit the information below, where failure to include the requested information may have a negative impact on the evaluation of the offer:

- a. Quotation Format: One (1) original and three (3) copies of each quote, samples, and literature to be submitted. The original copy of the quotation should be clearly labeled "ORIGINAL." One copy of each solicitation amendment, with signed acknowledgement, if any.
- b. Price quote: Offeror should submit a price for all services, materials, equipment, licenses, manuals, training, and any optional items offered.
- c. Prompt Payment Discount: Prompt payment discounts of thirty (30) days or more set forth in an Offer shall be deducted from the Offer for the purposes of evaluating that price.
- d. References: A minimum of three (3) business references. References will be verifiable and will be able to comment on the offeror's related experience and past performance. Offeror will provide the name, address, phone, contact person and a brief description of the services provided for each reference, on the forms attached to this quotation.
- e. Samples: Offeror should submit samples of reports and of the scannable form generated by the software and hardware.
- f. Descriptive Literature: Offers should include descriptive literature regarding the product and services it proposes to furnish. Literature will be sufficient in detail in order to allow full and fair evaluation of the offer submitted; however, voluminous submittals are discouraged. Failure to include descriptive information about the product and services may result in a negative evaluation of the offer.
- g. Small Business: In accordance with ARS 41-2535 and AAC R2-7-D302 purchases between \$1,000 and \$50,000, only a small business as defined in R2-7-101, shall be awarded a contract, unless any of the following apply:
  - i. The purchase has been unsuccessfully competed under R2-7-D303, including failure to obtain fair and reasonable pricing; or
  - ii. The agency chief procurement officer has made a written determination that restricting the procurement to small business is not practical under the circumstances.

A small business is one that, including its affiliates, is independently owned and operated, is not dominant in the type of business it conducts, and which employs fewer than 100 full-time employees or which had gross receipts of less than \$4 million dollars in its last fiscal year.

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By checking the appropriate box, and signing the quote in response to this solicitation, an offeror certifies its small business status, which is a small business as defined in this solicitation document.

h. **Documentation:** Bidder shall submit any applicable licenses and certifications.


3. **CONFLICT OF INTEREST:** The offeror shall list in its offer all potential, actual, apparent or real conflicts of interest it may or does have in providing the ASRS with commodities, services, software, maintenance and training. If the offeror is in doubt over what may constitute conflict of interest, the offeror shall ask the ASRS for clarification and instructions.
4. **INQUIRIES:** Any question related to a Request For Quotation shall be directed to the Procurement Specialist whose name appears on the front. The offeror shall not contact or ask questions of the department for which the requirement is being procured. Questions should be submitted in writing when time permits. Any correspondence related to a solicitation should refer to the appropriate solicitation number, page and paragraph number.
5. **WITHDRAWAL OF QUOTATION:** At any time prior to a specified solicitation due time and date a Bidder (or designated representative) may withdraw the Quotation. Facsimiles, telegraphic or mailgram withdrawals shall be considered.
6. **OPENING:** This is an informal quotation which will not be read at a public opening; however, the information may be publicly reviewed after an award.
7. **PRICING:** Price contained herein shall be firm for the specified equipment and/or service and shall include: Shipping FOB Destination, and includes insurance, and all other incidental cost. List any optional items separately on the quote in addition to the price.
8. **DEFINITION OF UNIT OF MEASURE:** For the purpose of definition and clarification for this Contract, the following codes have been established to abbreviate standard units of measure of line items contained herein:

<u>CODES</u>	<u>U/M DEFINITION</u>
Mx	Thousand
Ea	Each

9. **EVALUATION:** In accordance with the Arizona Procurement Code 41-2535, procurements not exceeding an aggregate amount of fifty thousand dollars, awards shall be made to the bidder submitting the quotation that is most advantageous to the state and conforms to the solicitation requirements.


## 10. AWARD OF CONTRACT:

- a. Unless the Bidder states otherwise, or unless otherwise provided within the Request For Quotation, the State reserves the right to award by individual line item or alternatives, by group of line items, or as a total, or to make an aggregate award, whichever is deemed most advantageous to the State. If the Procurement Officer determines that an aggregate award to one Offeror is not in the State's best interest, "all or none" offers shall be rejected.
- b. Notwithstanding any other provision of the Request For Quotation, the State reserves the right to:
  - i. Waive any immaterial defect or informality; or
  - ii. Reject any or all quotations, or portions thereof; or
  - iii. Reissue a Request For Quotation.

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c. A response to a Request For Quotation is an offer to contract with the State based upon the terms, conditions and specifications contained in the State's Request For Quotation. Quotations do not become contracts unless and until an authorized procurement officer accepts them. A contract has its inception in the award document, eliminating a formal signing of a separate contract. For that reason, all of the Terms and Conditions of the procurement contract are contained in the Request For Quotation, unless any of the Terms and Conditions are modified by a contract amendment (SPO Form 217), or by mutually agreed Terms and Conditions in the contract documents.

11. **BRAND NAME OR EQUAL:** Any manufacturer's names, trade names, brand name or catalog designations used in the specifications are for the purpose of describing and establishing the general quality level, design and performance desired. Such references are not intended to limit or restrict bidding by other vendors but are intended to approximate the quality design or performance which is desired. Any quotation, which proposes like quality, design or performance, will be considered. If the description of your offer differs in any way, you must give complete detailed description of your quotation including pictures and literature where applicable. Unless a specific exception is made, the assumption will be that the bid will be exactly as specified on the Request For Quotation.
12. **COST OF QUOTATION PREPARATION:** The State shall not reimburse the cost of developing, presenting or providing any response to this solicitation. Offers submitted for consideration should be prepared simply and economically, providing adequate information in a straightforward and concise manner.
13. **UNIFORM INSTRUCTIONS TO OFFERORS:** The contractor shall be subject to the Arizona State Procurement Office's (SPO) Uniform Instructions to Offerors currently in force and effect. Both documents may be found at the SPO website, <http://www.azspo.az.gov/PoliciesDocuments/index.htm> Said instructions are hereby incorporated by reference as though set forth in full herein and shall supercede any contract or other form of agreement supplied by offeror.
14. **PUBLIC RECORD:** All quotations submitted in response to this Request For Quotation shall become the property of the State and shall become a matter of Public Record available for review, subsequent to the award notification, as provided for by the Arizona Procurement Code.

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### Billing

All billing notices shall include purchase order number and be directed to the accounts payable department at the address listed on the purchase order.

### Payment

In accordance with Arizona Revised Statute § 35-342, any agency which purchases or procures goods and services from a nongovernmental entity on account, shall pay the account in full within thirty days after receipt of goods or services and correct notice of amount due in writing to the agency or shall pay interest on the outstanding balance at the rate of ten per cent per annum (as prescribed in § 44-1201) until the account is paid in full, unless a good faith dispute exists as to the agency's obligation to pay all or a portion of the account.

### Discounts

Payment discount periods shall be computed from the date of receipt of material/service or correct invoice, whichever is later, to the date the State's warrant is mailed. Unless freight and other charges are itemized, any discount provided shall be taken on full amount of invoice. Payment discounts of thirty (30) calendar days or more shall be deducted from the quotation price in evaluating the low quotation. The State shall be entitled to take advantage of any payment discount offered by the Vendor provided payment is made within the discount period.

### Taxes

The State will pay any applicable State of Arizona transaction privilege tax and any other applicable state or local taxes on the services rendered or products supplied. No payment shall be made for any personal property taxes levied on vendor or any taxes levied on employee's wages. Applicable taxes shall be shown separately on any invoice and such sums shall be due and payable to vendor upon delivery. If claiming a tax exemption, State will provide vendor with valid tax exemption certificates.

### Term of Contract

The term of the contract shall commence on the date indicated on the offer and acceptance form and shall remain in effect for a period of one (1) year unless terminated, canceled or extended as otherwise provided herein or the aggregate of payments under this contract exceeds \$50,000.

### Contract Renewal


The contract shall not bind nor purport to bind the ASRS for any contractual commitment in excess of the original contract period. The ASRS shall have the right, at its sole option, to renew the contract for two (2) one-year periods or a portion thereof. If the ASRS exercises such rights, all terms, conditions and provisions of the original contract shall remain the same and apply during the renewal period. Any extension beyond that mentioned in this paragraph may only be made at the sole discretion of the ASRS with approval by the Director of the Arizona Department of Administration.

### Contract Type (Term)

Fixed price, indefinite quantity.

### Changes to the Contract

The Contractor understands and agrees that the needs of the ASRS may change during the life of this contract and that the ASRS may propose changes to any part of this contract with a commensurate, fair and equitable adjustment in price. Any such changes shall be made in accordance with the Amendments clause of this contract.

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### Equitable Adjustments

If the Contractor fails to perform satisfactorily under this contract, including, but not limited to untimely delivery, mistakes, or any other requirement under the specifications and terms and conditions of this contract, the ASRS may, at its sole discretion, request the Contractor to make an equitable adjustment in the payment for that specific service. Such request for an equitable adjustment may be made in addition to any other remedies provided for under this contract.

### Contract Cancellation (Immediate)

This contract is critical to the State of Arizona and the state reserves the right to immediately cancel the whole or any part of this contract due to failure of the contractor to carry out any material obligation, term or condition of the contract. The state shall issue a written notice of default effective at once and not deferred by any interval of time. Default shall be for acting or failing to act on in any of the following:

1. The contractor provides material that does not meet the specifications of the contract;
2. The contractor fails to adequately perform the services set forth in the specifications of the contract;
3. The contractor fails to complete the work required or furnish the materials required within the time stipulated in the contract;
4. The contractor fails to make progress in the performance of the contract and/or gives the state reason to believe that the contractor will not or cannot perform to the requirements of the contract.

The state may resort to any single or combination of the following remedies:

- A. Cancel any contract;
- B. Reserve all rights or claims to damage for breach of any covenants of the contract;
- C. Perform any test or analysis on materials for compliance with the specifications of the contract. If the result of any test confirms a material non-compliance with the specifications, any reasonable expense of testing shall be borne by the contractor;
- D. In case of default, the state reserves the right to purchase materials or to complete the required work in accordance with the Arizona Procurement Code. The state may recover reasonable excess costs from the contractor by:
  1. Deduction from an unpaid balance;
  2. Collection against the bid and/or performance bond; or
  3. Any combination of the above or any other remedies as provided by law.


### Shipping F.O.B. Destination/Installation

Prices shall be F.O.B. destination/installation to the delivery location designated herein. Contractor shall retain title and control of all goods until they are delivered and installation has been completed. All risk of transportation and all related charges shall be the responsibility of the contractor. All claims for visible or concealed damage shall be filed by the contractor. The state will notify the contractor promptly of any damaged goods and shall assist the contractor in arranging for inspection.

### Delivery (Specified)

Pick-up and delivery trucks must have a vertical clearance of less than 12 feet and horizontal clearance of 27 feet to enter the loading dock. The building is closed to deliveries during the hours of 7:30a.m. to 8:30 a.m., 11:30 a.m. to 1:00 p.m., and 4:30 p.m. to 5:30 p.m. Twenty Four hour notice prior to delivery must be provided to the contract manager, so that security clearance can be arranged.

### General Information

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The Contractor may not make any changes to the specifications, delivery schedule, or price without prior written approval by the ASRS.

### **Safety Standards**

All items supplied on this contract must comply with the current applicable occupational safety and health standards of the State of Arizona Industrial Commission, The National Electric Code, and The National Fire Protection Association Standards.

### **Eligible Agencies (Listed)**

Any contract resulting from this solicitation shall be for the exclusive use of the Arizona State Retirement System.

### **Uniform Terms and Conditions**

The contractor shall be subject to the Arizona State Procurement Office's (SPO) Uniform Terms and Conditions currently in force and effect. Both documents may be found at the SPO website, <http://www.azspo.az.gov/PoliciesDocuments/index.htm>. Said terms, conditions are hereby incorporated by reference as though set forth in full herein and shall supercede any contract or other form of agreement supplied by offeror.

### **Warranty (Exclusive Statement)**

If applicable, all materials and/or equipment supplied under this specification shall be fully guaranteed by the contractor for a minimum period to be indicated on the price sheet by bidder, and as accepted by the ASRS. Any defects of design, workmanship, or materials, shall be fully corrected by the contractor (including parts and labor) without cost to the State.

### **Federal Immigration And Nationality Act 2**

The contractor shall comply with all federal, state and local immigration laws and regulations relating to the immigration status of their employees during the term of the contract. Further, the contractor shall flow down this requirement to all subcontractors utilized during the term of the contract. The State shall retain the right to perform random audits of contractor and subcontractor records or to inspect papers of any employee thereof to ensure compliance. Should the State determine that the contractor and/or any subcontractors be found noncompliant, the State may pursue all remedies allowed by law, including, but not limited to; suspension of work, termination of the contract for default and suspension and/or debarment of the contractor.

### **IT 508 Compliance**

Any electronic or information technology offered to the State of Arizona under this solicitation shall comply with A.R.S. §§ 41-2531 and 2532 and Section 508 of the Rehabilitation Act of 1973, which requires that employees and members of the public shall have access to and use of information technology that is comparable to the access and use by employees and members of the public who are not individuals with disabilities. Any exceptions shall be declared in writing in the offer.


### **Offshore Performance of Work Prohibited**

Due to security and identity protection concerns, all services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision applies to work performed by subcontractors at all tiers.

### **INDEMNIFICATION CLAUSE:**

Contractor shall indemnify, defend, save and hold harmless the State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees (hereinafter referred to as "Indemnitee") from and against any and all claims, actions, liabilities, damages, losses, or expenses (including court costs, attorneys' fees, and costs of claim processing, investigation and litigation) (hereinafter referred to as "Claims") for bodily injury or personal injury (including death), or loss or damage to tangible or intangible property caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of Contractor or any of its owners, officers, directors, agents, employees or subcontractors. This indemnity includes any claim or amount arising out of or recovered under the Workers'



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Compensation Law or arising out of the failure of such contractor to conform to any federal, state or local law, statute, ordinance, rule, regulation or court decree. It is the specific intention of the parties that the Indemnatee shall, in all instances, except for Claims arising solely from the negligent or willful acts or omissions of the Indemnatee, be indemnified by Contractor from and against any and all claims. It is agreed that Contractor will be responsible for primary loss investigation, defense and judgment costs where this indemnification is applicable. In consideration of the award of this contract, the Contractor agrees to waive all rights of subrogation against the State of Arizona, its officers, officials, agents and employees for losses arising from the work performed by the Contractor for the State of Arizona.

*This indemnity shall not apply if the contractor or sub-contractor(s) is/are an agency, board, commission or university of the State of Arizona.*

### **INSURANCE REQUIREMENTS:**

Contractor and subcontractors shall procure and maintain until all of their obligations have been discharged, including any warranty periods under this Contract, are satisfied, insurance against claims for injury to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors.

The *insurance requirements* herein are minimum requirements for this Contract and in no way limit the indemnity covenants contained in this Contract. The State of Arizona in no way warrants that the minimum limits contained herein are sufficient to protect the Contractor from liabilities that might arise out of the performance of the work under this contract by the Contractor, its agents, representatives, employees or subcontractors, and Contractor is free to purchase additional insurance.

**A. MINIMUM SCOPE AND LIMITS OF INSURANCE:** Contractor shall provide coverage with limits of liability not less than those stated below.

**1. Commercial General Liability – Occurrence Form**

Policy shall include bodily injury, property damage, personal injury and broad form contractual liability coverage.


- |  |             |
|--|-------------|
| • General Aggregate                                | \$1,000,000 |
| • Products – Completed Operations Aggregate        | \$ 500,000  |
| • Personal and Advertising Injury                  | \$ 500,000  |
| • Blanket Contractual Liability – Written and Oral | \$ 500,000  |
| • Fire Legal Liability                             | \$ 25,000   |
| • Each Occurrence                                  | \$ 500,000  |

- a. The policy shall be endorsed to include the following additional insured language: ***“The State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees shall be named as additional insureds with respect to liability arising out of the activities performed by or on behalf of the Contractor”.***
- b. Policy shall contain a waiver of subrogation against the State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees for losses arising from work performed by or on behalf of the Contractor.

**2. Automobile Liability**

Bodily Injury and Property Damage for any owned, hired, and/or non-owned vehicles used in the performance of this Contract.

Combined Single Limit (CSL)	\$500,000
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- a. The policy shall be endorsed to include the following additional insured language: ***"The State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees shall be named as additional insureds with respect to liability arising out of the activities performed by or on behalf of the Contractor, involving automobiles owned, leased, hired or borrowed by the Contractor"***.

**3. Worker's Compensation and Employers' Liability**


Workers' Compensation	Statutory
Employers' Liability	
Each Accident	\$ 100,000
Disease – Each Employee	\$ 100,000
Disease – Policy Limit	\$ 100,000

- a. Policy shall contain a waiver of subrogation against the State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees for losses arising from work performed by or on behalf of the Contractor.

- b. This requirement shall not apply to: Separately, EACH contractor or subcontractor exempt under A.R.S. 23-901, AND when such contractor or subcontractor executes the appropriate waiver (Sole Proprietor/Independent Contractor) form.


- B. ADDITIONAL INSURANCE REQUIREMENTS:** The policies shall include, or be endorsed to include, the following provisions:
1. The State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees wherever additional insured status is required such additional insured shall be covered to the full limits of liability purchased by the Contractor, even if those limits of liability are in excess of those required by this Contract.
  2. The Contractor's insurance coverage shall be primary insurance with respect to all other available sources.
  3. Coverage provided by the Contractor shall not be limited to the liability assumed under the indemnification provisions of this Contract.
- C. NOTICE OF CANCELLATION:** Each insurance policy required by the insurance provisions of this Contract shall provide the required coverage and shall not be suspended, voided, canceled, or reduced in coverage or in limits except after thirty (30) days prior written notice has been given to the State of Arizona. Such notice shall be sent directly to Shireen Boone, Contract Manager, Arizona State Retirement System, 3300 N. Central Avenue, Suite 1300, Phoenix, Arizona, 85012, and shall be sent by certified mail, return receipt requested.
- D. ACCEPTABILITY OF INSURERS:** Insurance is to be placed with duly licensed or approved non-admitted insurers in the State of Arizona with an "A.M. Best" rating of not less than A- VII. The State of Arizona in no way warrants that the above-required minimum insurer rating is sufficient to protect the Contractor from potential insurer insolvency.
- E. VERIFICATION OF COVERAGE:** Contractor shall furnish the State of Arizona with certificates of insurance (ACORD form or equivalent approved by the State of Arizona) as required by this Contract. The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf.

All certificates and endorsements are to be received and approved by the State of Arizona before work commences. Each insurance policy required by this Contract must be in effect at or prior to commencement of work under this Contract and remain in effect for the duration of the project. Failure to maintain the insurance policies as required by this Contract, or to provide evidence of renewal, is a material breach of contract.

	<h2>Special Terms and Conditions</h2>		<b>Arizona State Retirement System</b>  14 <sup>th</sup> Floor  3300 N. Central  Phoenix, AZ 85012
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All certificates required by this Contract shall be sent directly to Shireen Boone, Contract Manager, Arizona State Retirement System, 3300 N. Central Avenue, Suite 1300, Phoenix, Arizona, 85012. The State of Arizona project/contract number and project description shall be noted on the certificate of insurance. The State of Arizona reserves the right to require complete, certified copies of all insurance policies required by this Contract at any time. **DO NOT SEND CERTIFICATES OF INSURANCE TO THE STATE OF ARIZONA'S RISK MANAGEMENT SECTION.**

- F. **SUBCONTRACTORS:** Contractors' certificate(s) shall include all subcontractors as insureds under its policies **or** Contractor shall furnish to the State of Arizona separate certificates and endorsements for each subcontractor. All coverages for subcontractors shall be subject to the minimum requirements identified above.
- G. **APPROVAL:** Any modification or variation from the *insurance requirements* in this Contract shall be made by the Department of Administration, Risk Management Section, whose decision shall be final. Such action will not require a formal Contract amendment, but may be made by administrative action.
- H. **EXCEPTIONS:** In the event the Contractor or sub-contractor(s) is/are a public entity, then the Insurance Requirements shall not apply. Such public entity shall provide a Certificate of Self-insurance. If the contractor or sub-contractor(s) is/are a State of Arizona agency, board, commission, or university, none of the above shall apply.

	<b>Scope of Work</b>		<b>Arizona State Retirement System</b> 3300 N. Central Avenue, Suite 1300 Phoenix, AZ 85012
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## **MEMBER SURVEY TRACKING SYSTEM**

### **Introduction**

The Arizona State Retirement System (ASRS) is ranked as one of the top pension funds in the United States. There are over 487,000 members of which approximately 84,000 are retired. The ASRS encompasses the state, including 3 state universities, all 10 community colleges, 15 counties and most cities, towns and school districts. Further information about the ASRS may be found at the ASRS website [www.azasrs.gov](http://www.azasrs.gov).

### **Background**

The ASRS has an ongoing requirement to improve member satisfaction to its 487,000 members. The ASRS has achieved the satisfaction measurement of the members, by outsourcing the survey and tabulation services to an off site contractor.

### **Requirements**

In January 2008, the ASRS intends to assume responsibility of issuing and tabulating the surveys internally, and is seeking to purchase a scanner-based survey information capture and reporting system. The system will automate the sampling, distribution, collection, cross-tabulation, and reporting for multiple member satisfaction surveys. The ideal product will accommodate both mail (paper) and electronic (e-mail) distribution and collection methods. The initial anticipated number of separate surveys is approximately 10, which would be sent to a total of approximately 5,000 to 10,000 members per month. The current response rate of the member surveys is approximately 20 to 30% per month.

The complete system should include all of the following items, but not limited to:

- software and maintenance
- scanner hardware, warranty and maintenance
- professional services including onsite installation
- training
- support



## Exhibit A - Offeror's Experience

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**Arizona State Retirement System**  
3300 N. Central Avenue, Suite 1300  
Phoenix, AZ 85012

### INFORMATION TO BE PROVIDED FOR REFERENCES

1. Contract Title (if applicable): \_\_\_\_\_

2. Contract Period: From \_\_\_\_\_ To \_\_\_\_\_

3. Geographic Area Served: \_\_\_\_\_

4. Scope of Work: \_\_\_\_\_

5. Reference:  
Company: \_\_\_\_\_

Individual/Title: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Website Address: \_\_\_\_\_



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# **End of Contract RT08-010 Document**